APHIS Metastorm BPM Registration and Authorization User Guide

Version 1.6, December 2011

**For Metastorm BPM
Version 7.5**

**Technology
Management
Branch**

NOTICES

- The information in this document is subject to change without notice.

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DOCUMENT HISTORY

Version 1.3	February 2008	Updated text and screen shots to new version of Metastorm BPM
Version 1.4	January 2009	Updated application registration and user role approval screen shots; updated text for user role access approval process
Version 1.5	March 2009	Updated Business Role Manager Section with information about using the Blank Forms List to restart an application access request; updated

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Chapter 1
Introduction

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*T*he *APHIS Metastorm BPM Registration and Authorization Guide provides Requestors, User Administrators, and Business Role Managers with information about the Metastorm BPM registration and authorization process including:*

- *Requesting access to applications;*
- *Establishing and verifying login accounts;*
- *Processing requests for application access;*
- *Managing various application access requests; and*
- *Restarting application access requests*

The following sections define Metastorm BPM users and provide ITD Application and Information Management (AIM) contact information.

1.1   Definition of Metastorm BPM Users

Metastorm BPM Users	
Requestor	A user who submits a request for access to Metastorm BPM applications.
Business Role Manager	APHIS program manager who is responsible for processing Metastorm BPM application access requests and managing user role assignments.
User Administrator	ITD-TMB Metastorm BPM administrator who is responsible for verifying and creating Metastorm BPM login account IDs and passwords. The User Administrator receives requests to establish new user accounts from the Business Role Manager.

1.2 APHIS ITD Contacts

Location	Contact	Email	Phone
Riverdale	Brian Bowman	Brian.E.Bowman@aphis.usda.gov	301-734-8753
Minneapolis	Joshua Kessler	Joshua.A.Kessler@aphis.usda.gov	612-336-3359
	Kathy Leners	Kathy.A.Leners@aphis.usda.gov	612-336-3374
Fort Collins	Paul Mihaly	Paul.M.Mihaly@aphis.usda.gov	970-494-7089

Chapter 2
Requesting Access to Metastorm BPM Applications

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T*his chapter provides information about requesting access to Metastorm BPM applications for both first-time and subsequent requestors. The Metastorm BPM system will provide the first-time requestor with a permanent login ID and a temporary password along with verification of application access privileges. Requestors should use the login ID established during the initial registration for all subsequent requests for application access privileges. When requestors log into Metastorm BPM for the first time, they are required to change the temporary password. All future logins will require the original login ID and requestor-selected password for access.*

2.1 Requesting Access to Metastorm BPM Applications for First-time Users

When a first-time user submits a request for access to a Metastorm BPM application, the following actions occur:

- The User Administrator establishes a login user ID and password, and
- The Business Role Manager grants access to the requested application.

1. Using Internet Explorer, access the APHIS TechCenter homepage located at:

    http://techcenter.aphis.usda.gov/ework/

2. Click on the _____ link located under the Metastorm BPM
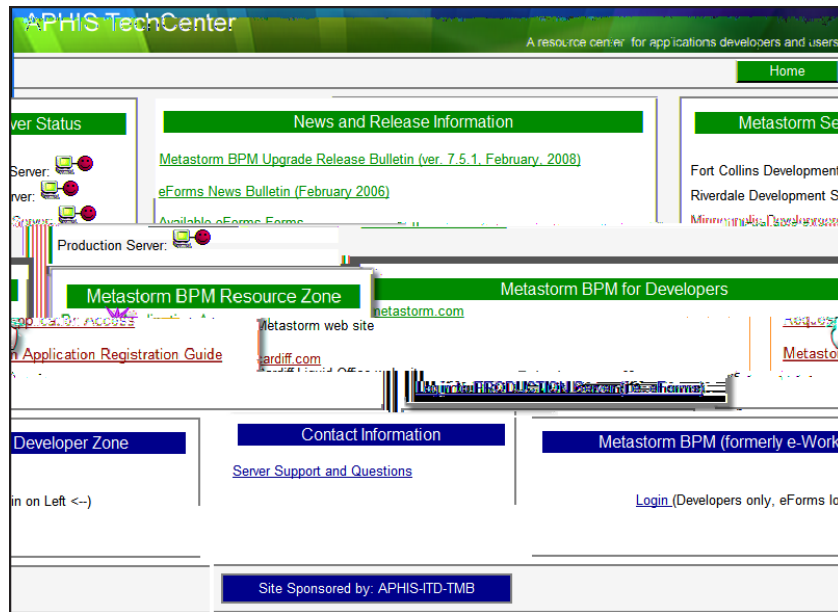   Resource Zone (see Figure 2-1).

Figure 2-1: APHIS TechCenter Homepage

3. The Metastorm BPM Application Registration page opens (see Figure 2-2).

Figure 2-2: Metastorm BPM Application Registration Page

4. Select the application that you are requesting access to from the dropdown menu.

5. Select your relationship to APHIS from the dropdown menu.

6. Enter your username. APHIS employees should enter their Windows network login name, and all other requesters should enter their desired login name.

7. Enter your full name, address, city, state, zip code, country, email address, and work telephone number in the remaining required fields.

8. Submit your Metastorm BPM application registration by clicking on the green submit arrow in the lower right corner of the page.

9. You will immediately receive a Microsoft Explorer message box informing you that the Web page you are viewing is trying to close the Window and asking you if you want to close the window (see Figure 2-3). Click yes.
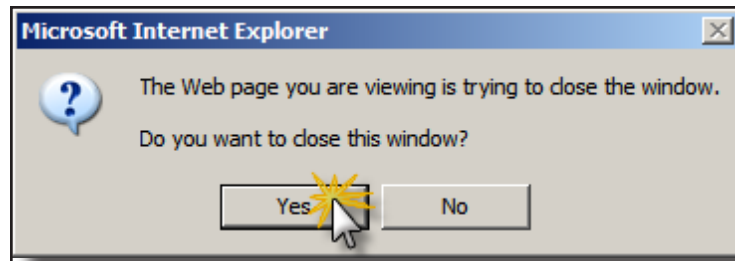

Figure 2-3: Microsoft Explorer Close Window Message Box

2.2 Receiving Your Metastorm BPM Login ID, Password Information, and Application Access

Once you have completed the Metastorm BPM application registration form, you will receive email messages from the Business Role Manager informing you about the status of your request. If your request is approved, you will receive three separate emails from the Business Role Manager.

- The first message confirms your Metastorm BPM login ID,
- The second message informs you that your request for access to a Metastorm BPM application has been approved, and
- The final email provides you with your password for accessing the requested application.

Once you receive confirmation of your Metastorm BPM login ID and password, you can login to Metastorm BPM and access your requested application.

✎ It is strongly recommended that you change your initial Metastorm BPM password. You can click on the link that is provided in your Metastorm BPM application access email to open the change password window. Or refer to Section 2.3 for information about changing your password via the Administration Forms option after your first-time login to Metastorm BPM.

2.1.1 Initial Login to Metastorm BPM

1. Using Internet Explorer, access the APHIS TechCenter homepage located at:

   http://techcenter.aphis.usda.gov/ework/

2. Click on the   link located under the Metastorm BPM Resource Zone (see Figure 2-4).
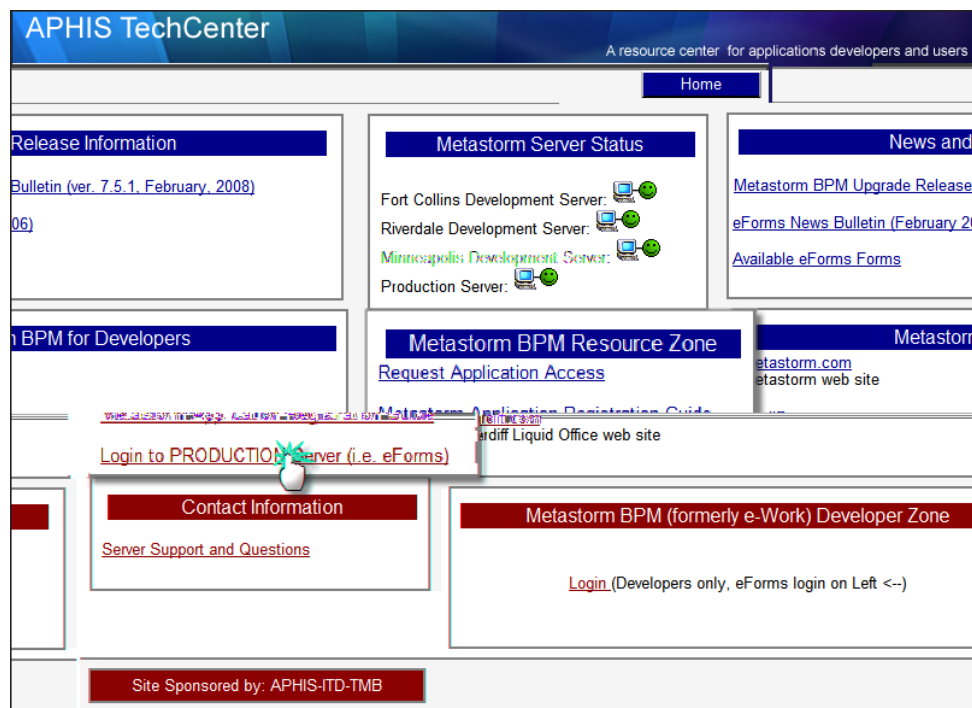
Figure 2-4: APHIS TechCenter Homepage

3. When the Metastorm BPM login window opens, enter your Metastorm BPM user name and password in the login dialog box. Click the green submit arrow (see Figure 2-5).
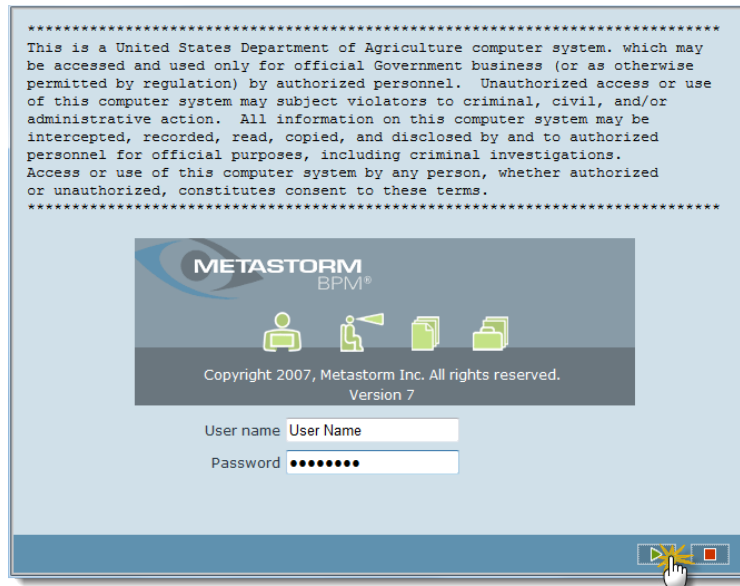
Figure 2-5: Metastorm BPM Login Window

You now have access to the Metastorm BPM application access window. Figure 2-6 provides an overview of the navigation and workf ow environment in Metastorm BPM.
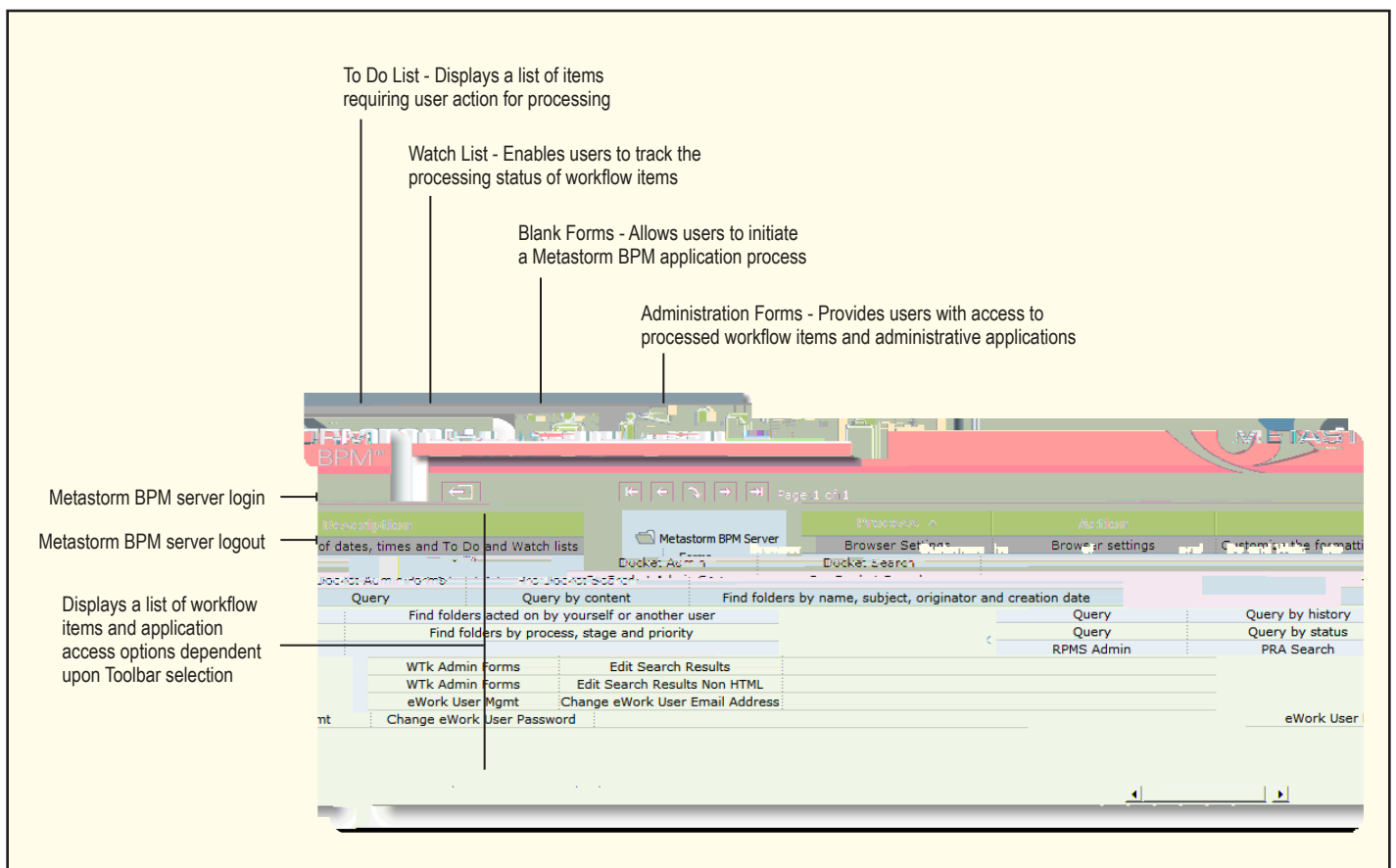
Figure 2-6: Metastorm BPM Navigation and Workflow Options

2.3 Changing Your Account Password and eMail Information

The following instructions for Metastorm BPM login password and email updates apply to both first-time and subsequent users who are requesting password changes.

1. Login to Metastorm BPM and select Administration Forms to access the process option (see Figure 2-7).
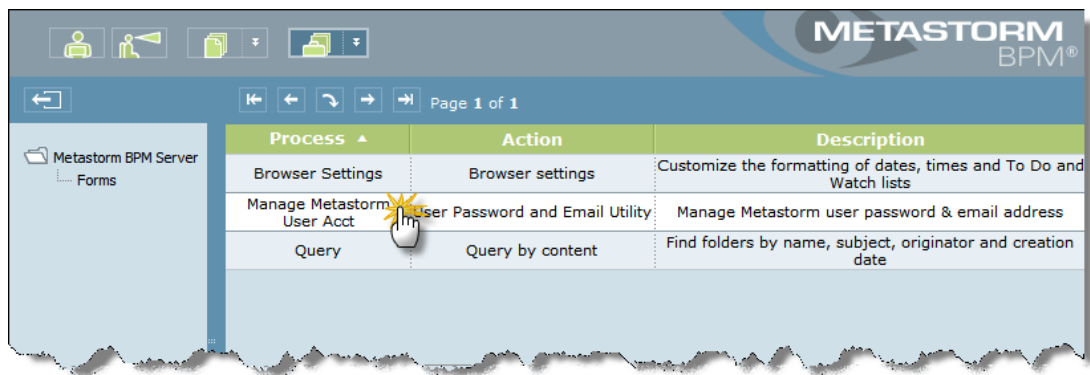
Figure 2-7: Change BPM User Password Option in the Administration Forms Menu

2. When the window opens, click the checkbox next to Change Metastorm Account Password. When the new password field opens, enter your new password (see Figure 2-8).

Figure 2-8: Changing your Metastorm BPM Password

3. You can update your email information by clicking on the checkbox next to Update Email Address. Enter your email address in the New Email Address field (see Figure 2-9).
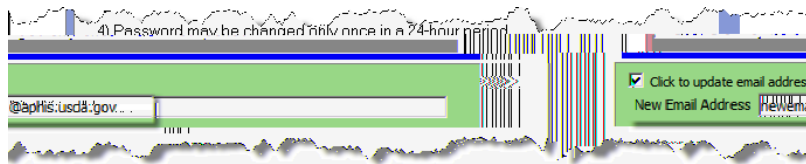
Figure 2-9: Changing your Metastorm BPM Email Information

4. Click the green submit arrow to update your Metastorm BPM password and email information (see Figure 2-10).
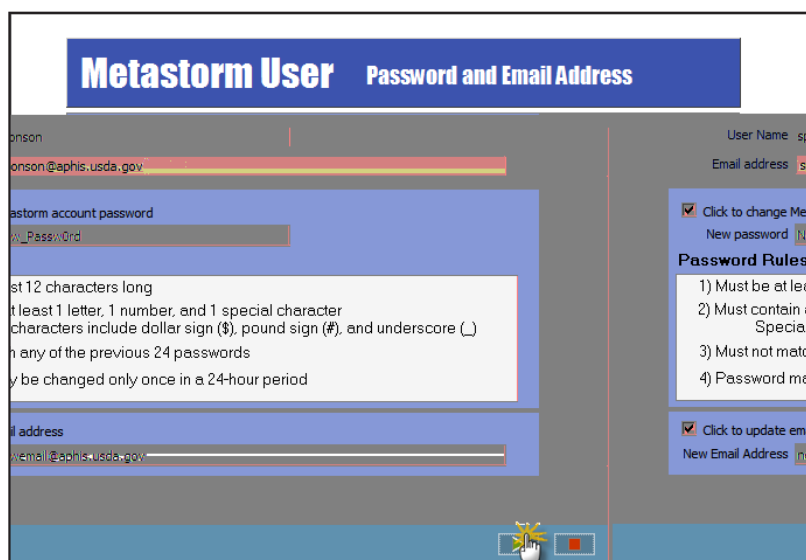

Figure 2-10: Submitting your Updated Metastorm BPM Password and Email Information

2.4 Requesting Application Access for Established Metastorm BPM Users

Users who have established a Metastorm BPM ID and password can request access to additional applications using one of two methods:

1. Complete an application access request using the Metastorm BPM Application Registration Web page, or

2. Login to Metastorm BPM and use the   menu to complete an application registration request.

2.4.1 Requesting Access to Additional Applications Using the Metastorm BPM Application Registration Web page

1. Login to the APHIS TechCenter homepage located at:

   http://techcenter.aphis.usda.gov/ework/

2. Click on the   link located under the Metastorm BPM Production Server (refer to Figure 2-1).

3. Complete all felds on the registration page (refer to Figure 2-2). Be sure to use the username that was originally assigned to you after your frst request.

4. Submit your Metastorm BPM application request by clicking on the green submit arrow.

5. Click yes to close the Internet Explorer message box and registration window (refer to Figure 2-3).

The Business Role Manager will process your request for application access privileges and send you an email notifcation regarding the status of your submission. Dependent upon your authorization status, you may receive an email approving or denying access to the application. If you have any questions regarding the outcome of your application access request, please contact a Business Role Manager. Contact information for the Business Role Manager is provided in the email notifcation.

2.4.2 Requesting Access to Additional Applications Using the Blank Forms Menu in Metastorm BPM

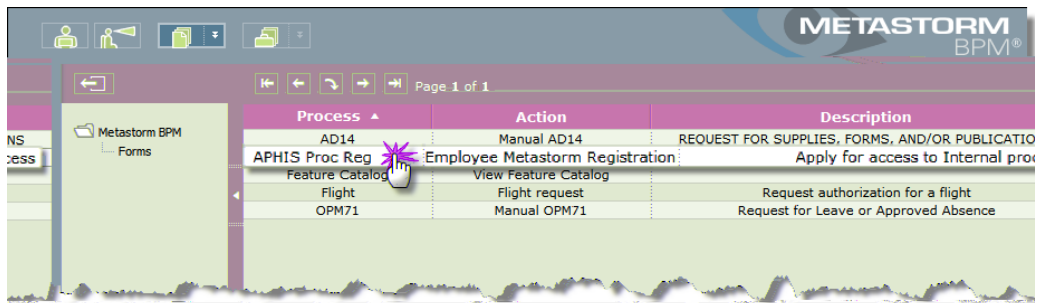1. Login to Metastorm BPM and select Blank Forms to access the option (see Figure 2-11).

Figure 2-11: Employee Metastorm Registration Option on Blank Forms Menu

2. Click once on Employee Metastorm Registration to open the window. Your information is automatically pre-filled in the username, name, and email fields (see Figure 2-12).

Figure 2-12: Pre-filled Metastorm BPM Application Registration Window

3. Complete the application registration page and click the green submit arrow.

The Business Role Manager will process your request for application access privileges and send you an email notifcation of the status of your submission. Dependent upon your authorization status, you may receive an email approving or denying access to the application. If you have any questions regarding the outcome of your application access request, please contact the Business Role Manager(s). Contact information for the Business Role Manager(s) is included in the email notifcation.

Chapter 3
How User Administrators Verify and Create Metastorm BPM User Login Accounts

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*T*his chapter provides Metastorm BPM User Administrators with information about verifying and creating Metastorm BPM login accounts. When a request for login account setup is submitted, the User Administrator receives an email notification. The new request is accessed and processed via the User Administrator's To Do List. If a request remains in the User Administrator's To Do List for more than three days, an email is sent to the AIM monitoring group for resolution and processing of the request. This chapter provides detailed information about:

- Verifying user login account information, and

- Creating new Metastorm BPM login accounts

3.1   Verifying Metastorm BPM User Login Accounts

Prior to creating a new Metastorm BPM user login account, the requestor's account information should always be verifed. For example, a requestor who has an established login account may submit a request for application access using an invalid user ID, which would prompt the Business Role Manager to send you a request to establish a new login account. The verifcation process prevents the establishment of a new user login account and resends the previously created user ID to the requestor.

1.   Login to Metastorm BPM and select your   to access the new request (see Figure 3-1).
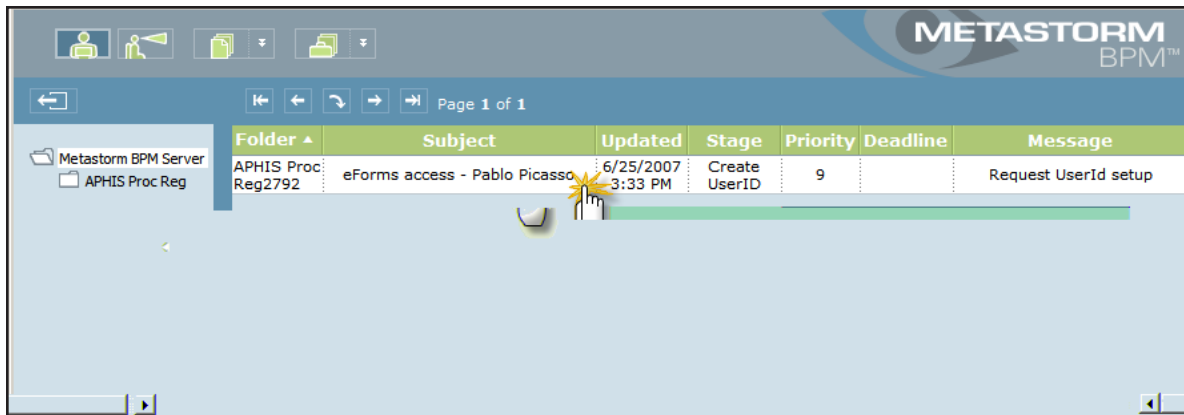
Figure 3-1: Metastorm BPM User Administrator To Do List Window

2.   Click once on the Create UserID option to open the Metastorm BPM Application Registration processing window (see Figure 3-2).

Figure 3-2: Metastorm BPM Application Registration Processing Window

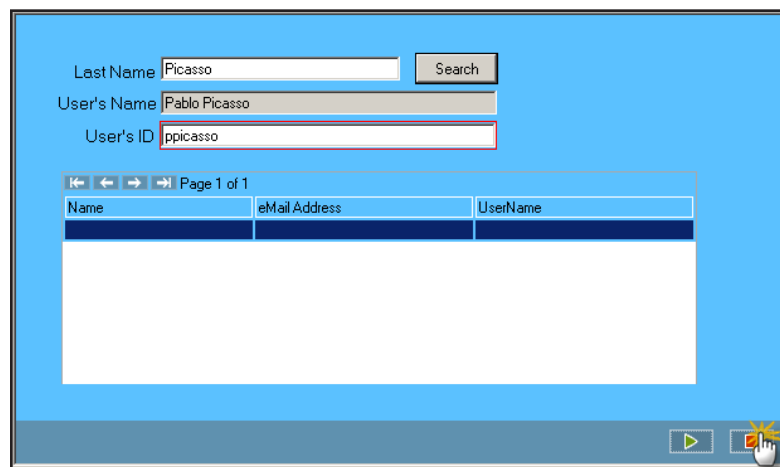3. To verify if the requestor has a pre-existing Metastorm BPM login account, click to open the verification window (see Figure 3-3).

Figure 3-3: Metastorm BPM User Login Account Verification Window

4. Type the requestor's last name in the search field and click Search (refer to Figure 3-3).

5. The system will search for the requestor's last name. If no match is found, the system will return a blank window indicating that the user does not have an existing account (see Figure 3-4). Click the red cancel square to close the verification window. Refer to Section 3.2 for information about creating a new user login ID and password.

Figure 3-4: Blank Metastorm BPM User Login Account Verification Window

6. If a match is found, the requestor's name, email address, and user ID will appear in the search window display grid (see Figure 3-5). Click the red cancel square to close the verification window.

Figure 3-5: Metastorm BPM User Login Account Verification Showing a Name Match

7. When you return to the Metastorm BPM Application Registration processing window, click _____ to open the confirmation window (see Figure 3-6).

Figure 3-6: Metastorm BPM User Login Account Exists Confirmation Window

8. Enter the previously created user ID in the User's ID feld, add any comments regarding the account in the Notes section, and click the green submit arrow (refer to Figure 3-6).

9. The original user ID information is emailed to the requestor.

3.2 Creating Metastorm BPM User Login Accounts

After you verify that the requestor does not have a previously established user account login ID and password, you can establish a new login account.

1. When you return to the Metastorm BPM Application Registration Processing Window, click Create UserID to open the new user login account processing window (see Figure 3-7).
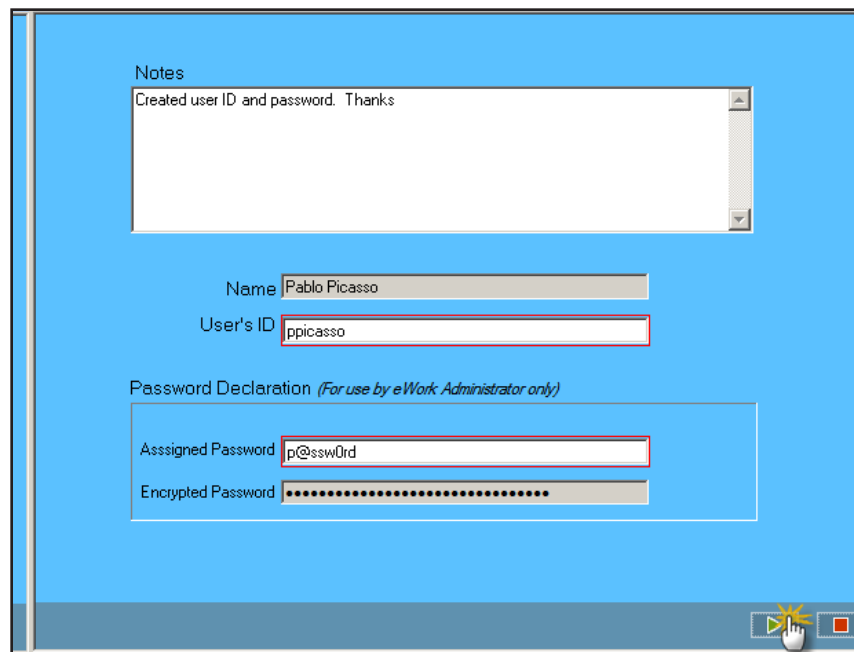
Figure 3-7: Metastorm BPM New User Login Account Processing Window

2. The user ID feld is automatically pre-flled with the requestor's user name. Enter a password in the Assigned Password feld and add any comments regarding the account setup in the Notes feld. Click the green submit arrow (refer to Figure 3-7).

3.	Two emails are sent to the requestor about the login account information. The first email contains the requestor's login user ID, and the second email provides the requestor with a temporary password.

The second email is sent after the Business Role Manager approves access to the requested application.

Chapter 4

How Business Role Managers Process Application Access Requests

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This chapter provides Metastorm BPM Business Role Managers with information about processing application access requests. The Business Role manager has the ability to:

- Submit requests for new login accounts to the User Administrator;
- Assign application roles to both new and subsequent Metastorm BPM login accounts,
- Deny and cancel application access requests;
- Verify previously assigned user role application access privileges; and
- Edit application access requests.

When a Requestor submits a request for application access privileges, an email notification is sent to the appropriate Business Role Manager. If a request remains in the Business Role Manager's To Do List for more than three days, an email is sent to the AIM monitoring group for resolution and processing of the request.

4.1   Processing Application Access Requests from First-time Metastorm BPM Users

The Business Role Manager is not able to assign a requestor application access if the requestor does not have an established user login account. To establish a new user login account, the Business Role Manager sends the request to the User Administrator. Once the User Administrator creates the login account, the Business Role Manager can assign access to the requested application.

To process application access requests from f rst-time users

1. Login to Metastorm BPM and select your   to access the new request (see Figure 4-1).
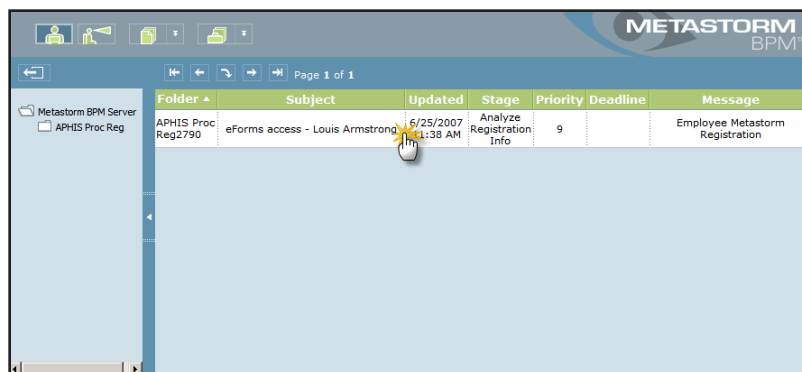
Figure 4-1: Metastorm BPM Business Role Manager To Do List Window

2. Click once on the request to open the Metastorm BPM Application Registration processing window (see Figure 4-2).

Figure 4-2: Metastorm BPM Application Registration Processing Window

3. Four action tabs are located at the bottom of the processing window (see Figure 4-3).

✎ *The Request UserID setup action tab is only available when the application access request is from a first-time Metastorm BPM user.*
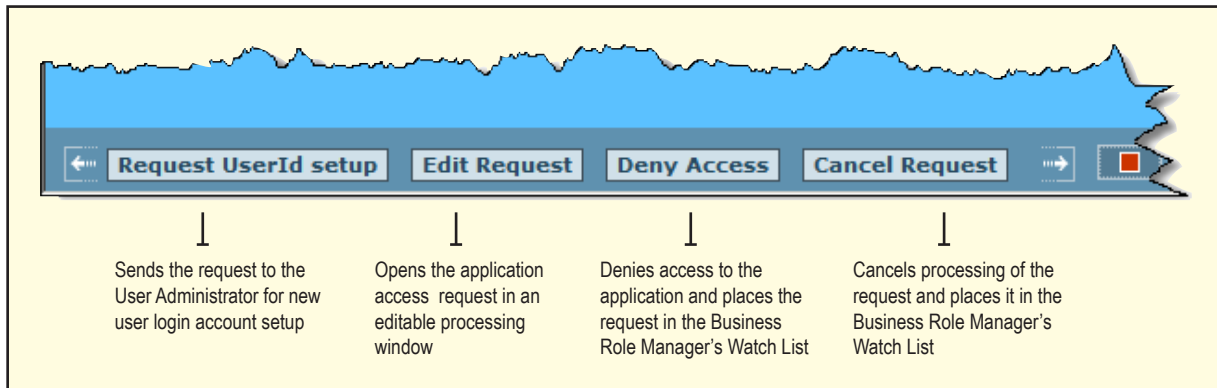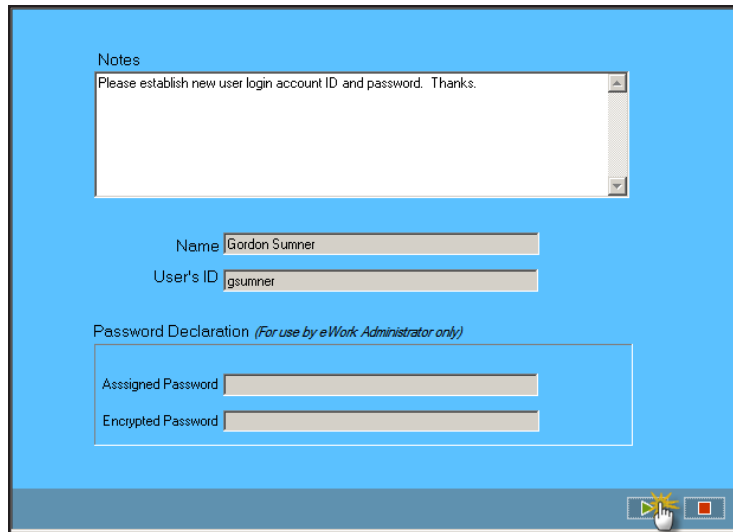
Figure 4-3: Metastorm BPM Application Registration Processing Window Action Tabs

4. If you determine that the application registration request requires any corrections or additional information, click Edit Request to open the application in an editable window. Make any necessary changes and click the green submit arrow to update the request and return to your To Do List.

5. Click Deny Access if you want to deny access to the application. The request is placed in your Watch List and an email is sent to the Requestor stating that the request has been denied.

6. To cancel processing of the request, click Cancel Request. The request is placed in your Watch List and an email is sent to the Requestor stating that the request has been canceled.

✎ *You can restart a denied or canceled application access request at any time from your Watch List. Refer to Chapter 5 for information about restarting application access requests.*

7. To send the request to the User Administrator for a new user login account ID and password, click Request UserID Setup.

8. When the new user login account ID and password request window opens, type any comments regarding the account setup in the Notes section and click the green submit arrow (see Figure 4-4).

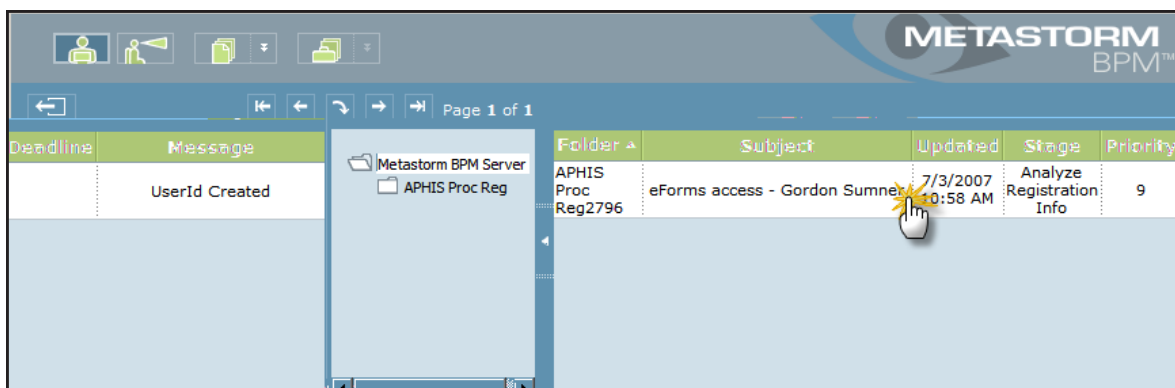9. The application request is sent to the User Administrator.

Figure 4-4: New User Login Account ID and Password Request Window

4.1.1 Assigning Application Access after UserID Login Account Setup

Once the User Administrator creates a user login account ID and password for the Requestor, you can assign user access to the requested application.

1. Login to Metastorm BPM and select your _____ to access the request (see Figure 4-5).

✎ *The Message column states UserID Created indicating that a new user login account has been established.*

Figure 4-5: Metastorm BPM Business Role Manager To Do List Window

2. Click once on the request to open the Metastorm BPM Application Registration processing window. Notice that the action tabs have changed to include the Assign Access processing option. In addition, you still have the ability to edit the request, deny access, or cancel the request (see Figure 4-6).

Figure 4-6: Updated Action Tabs on the Metastorm BPM Application Registration Processing Window

3. Click _____ to open the application access approval window. Verify the Requestor's Name and Email Address in the left column matches the information in the right column. If the information is correct, check the box to confirm and click Next (see Figure 4-7).   If the Name and Email Information do not match, go to Step 6.

Figure 4-7: Application Access Approval Window

4. When the _____ window opens, select the application role by clicking once on the role in the list (see Figure 4-8).

✎ *More than one application role can be selected. To select all available roles in a list hold down the Shift key and highlight all roles. To select roles not in sequential order, hold down the Control (Ctrl) key and click on each separate application role.*
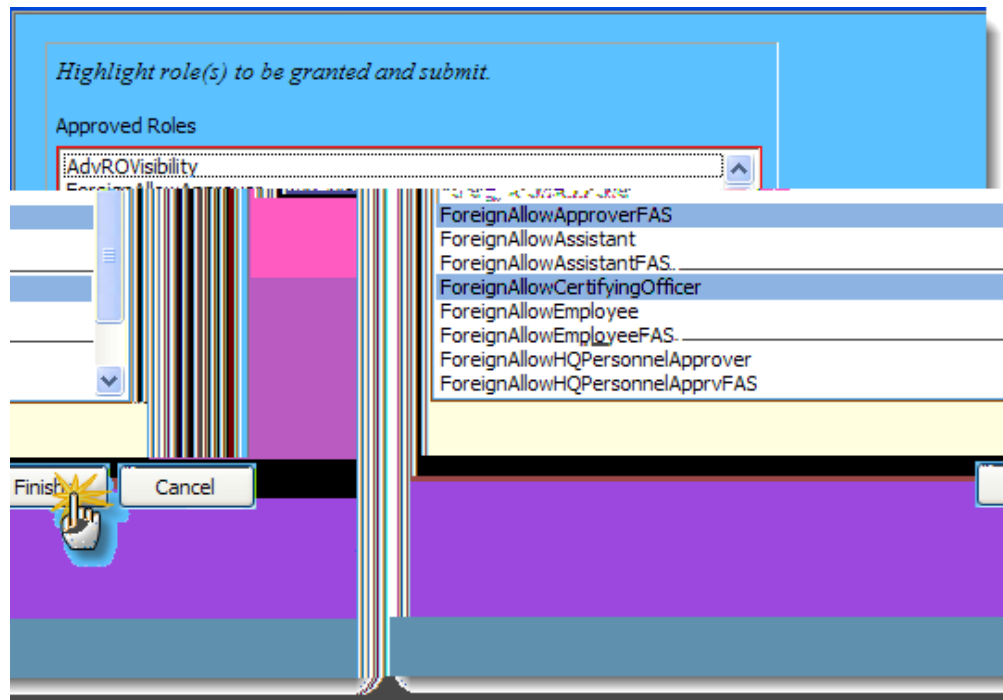

Figure 4-8: Approving Application Access

5. Click Finish to assign the user access to the requested application (refer to Figure 4-8). The Requestor receives an email stating that access to the requested application has been approved.

6. If the Name and Email Address information does not match, click View Username Search (see Figure 4-9).
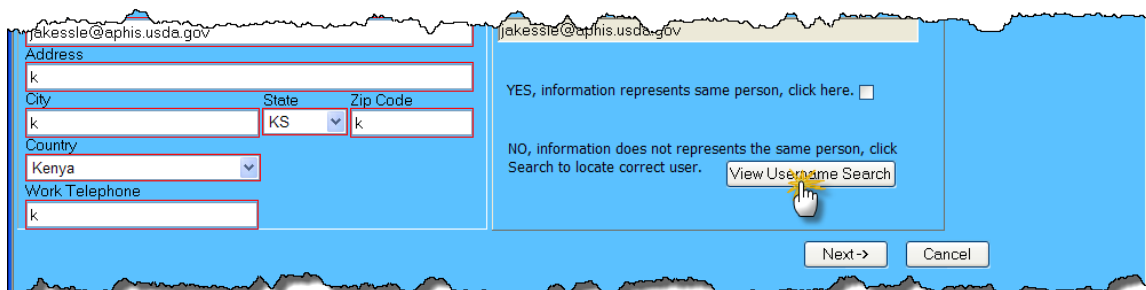

Figure 4-9: View Username Search Option

7. When the Username Search option opens, enter the user's last name in the search
   field and click Search (see Figure 4-10).

Figure 4-10: Username Search Field

8. After you locate the correct User ID, click once on the row of data to select it. The
   Name and Email Address information is automatically updated in the request.

9. Click once on the approved role to highlight it, and click the green submit arrow to
   assign the user access to the requested application. The Requestor receives an email
   stating that access to the requested application has been approved.

10. If you are not able to find the correct User ID in the Username search, check the box to
    request User ID setup, and click the green Submit arrow (see Figure 4-11).

Figure 4-11: Create New User ID Check Box

11. When you return to your _____ click once on the request to open the Metastorm BPM Application Registration processing window. Notice that the action tabs have changed to include the Request UserId setup processing option. In addition, you still have the ability to edit the request, deny access, or cancel the request (see Figure 4-12).

Figure 4-11: Create New User ID Check Box

12. To send the request to the User Administrator for a new user login account ID and password, click Request UserID Setup. When the new user login account ID and password request window opens, type any comments regarding the account setup in the Notes section and click the green submit arrow (refer to Figure 4-4). The application request is sent to the User Administrator.

13. You can assign access once the new user login account ID and password have been created.

4.2 Processing Application Access Requests from Established Metastorm BPM Users

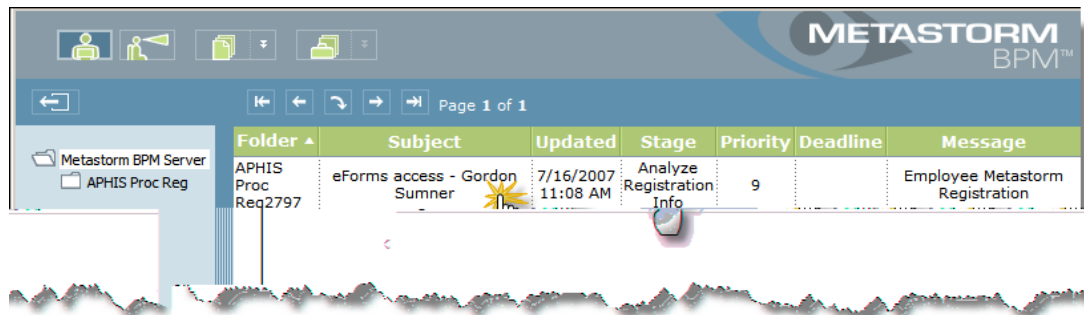1. Login to Metastorm BPM and select your _____ to access the request (see Figure 4-12).

Figure 4-12: Metastorm BPM Business Role Manager To Do List Window

2. Click once on the request to open the Metastorm BPM Application Registration processing window. In addition to viewing the initial registration page, two additional tabs at the top of the window allow you to view notes and user role assignments(see Figure 4-13).
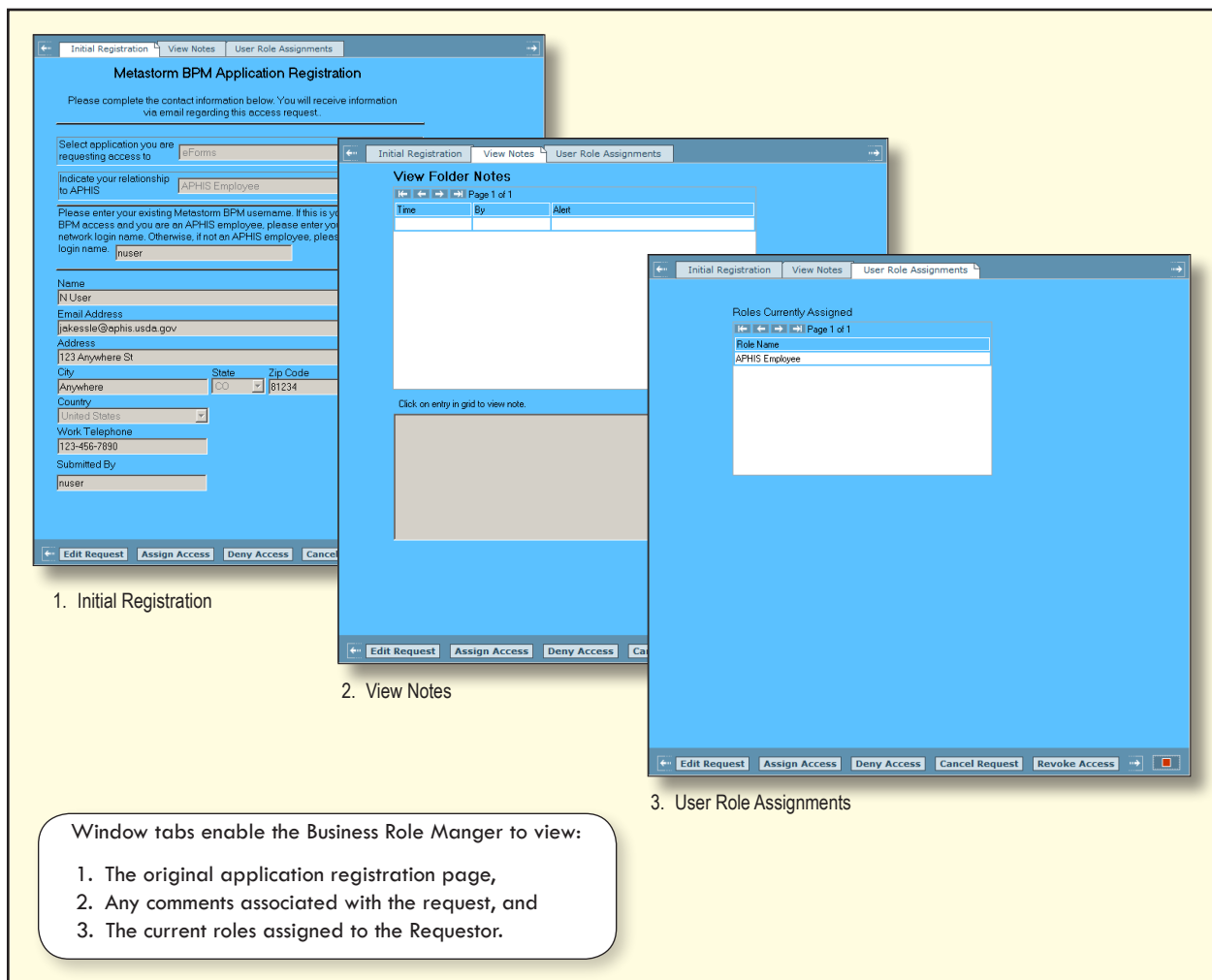

1. Initial Registration

2. View Notes

3. User Role Assignments

Window tabs enable the Business Role Manger to view:

1. The original application registration page,
2. Any comments associated with the request, and
3. The current roles assigned to the Requestor.

Figure 4-13: Metastorm BPM Application Registration Window Tabs

Tabs at the top of the window only allow you to view individual pages; you must use the action tabs at the bottom of the window to process the request.

3.   Five action tabs are located at the bottom of the processing window (see Figure 4-14).
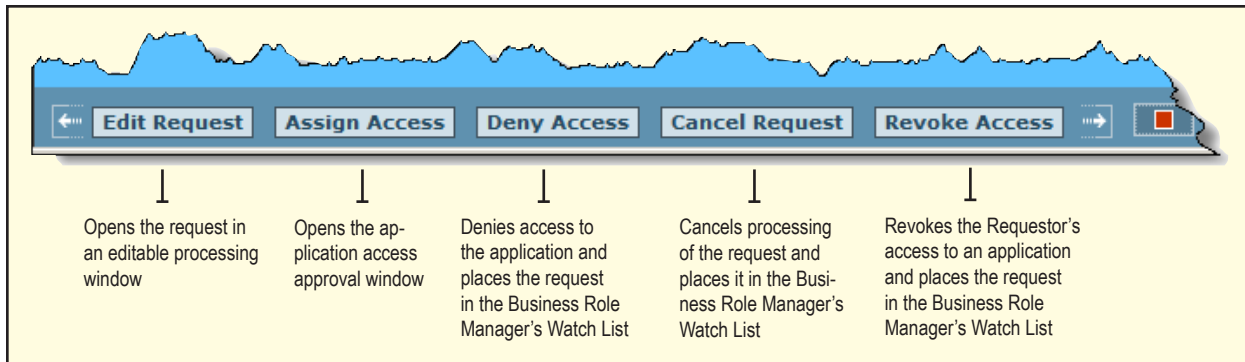

Figure 4-14: Metastorm BPM Application Registration Processing Window Action Tabs

4.   If you determine that the application registration request requires any corrections or additional information, click Edit Request to open the application in an editable window. Make any necessary changes and click the green submit arrow to update the request and return to your To Do List.

5.   Click Deny Access if you want to deny access to the application. The request is placed in your Watch List and an email is sent to the Requestor stating that the request has been denied.

6.   To cancel processing of the request, click Cancel Request. The request is placed in your Watch List and an email is sent to the Requestor stating that the request has been canceled.

You can restart a denied or canceled application access request from your Watch List. Refer to Section 5.1 for information about restarting application access requests.

7.   If you want to revoke access to an application, click Revoke Access. When the Revoke Access window opens, verify the Requestor's Name and Email Address in the left column matches the information in the right column. Check the box to confirm the information is correct, and click once on the application role that you are revoking to highlight it. Click the green Submit arrow (see Figure 4-15).

8.   The request is placed in your Watch List and an email is sent to the Requestor stating that application access has been revoked.

Figure 4-15: Revoke Access Processing Window

9. Choose Assign Access to open the application access approval window. Follow steps four through 13 in the previous section for approving user role access to a Metastorm BPM process.

10. Once you have approved access, the Requestor receives an email stating that access to the requested application has been approved.

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Chapter 5
Working with Restarted Application Access Requests

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*T*his chapter provides Metastorm BPM Business Role Managers with
information about restarting previously processed application access requests
Once an application access request has been restarted, Business Role Managers can:

- *Request user account establishment,*
- *Edit the request,*
- *Assign, deny, or revoke user role access; and*
- *Cancel the request.*

5.1   How Business Role Managers Restart Application Access Requests

As the Business Role Manager, you can restart application access requests using your Watch
List or Blank Forms List. The method you use to restart an application access request is based
on whether or not you originally processed the request. If you originally processed the request,
then it appears in your Watch List. You can restart the request from your Watch List and repro-
cess the request.

If the request was processed by a different Business Role Manager, then it will not appear in
your Watch List. To restart the request you have to complete and submit an application regis-
tration request for the user using the Registrar BPM Registration option on your Blank Forms List.
When you submit the application registration request, it appears on your To Do List and you can
reprocess the request. The following sections discuss both options for restarting an application
access request in detail.

5.1.1   Restarting Application Access Requests Using the Watch List

1.   Login to Metastorm BPM and select your   to access previously processed
      application access requests (see Figure 5-1).
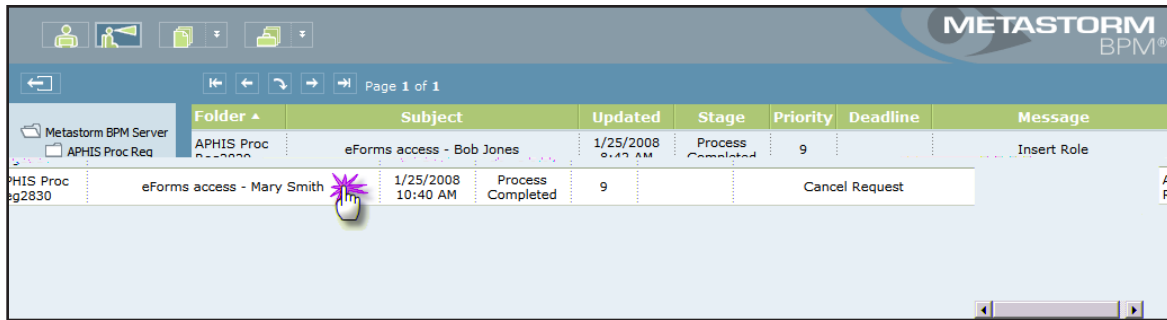
Figure 5-1: Metastorm BPM Watch List Window

2. Click once on a request to open the Metastorm BPM Application Registration processing window. In addition to viewing the initial registration page, two additional tabs at the top of the window allow you to view the current user role assignments and an audit trail of the request (see Figure 5-2).
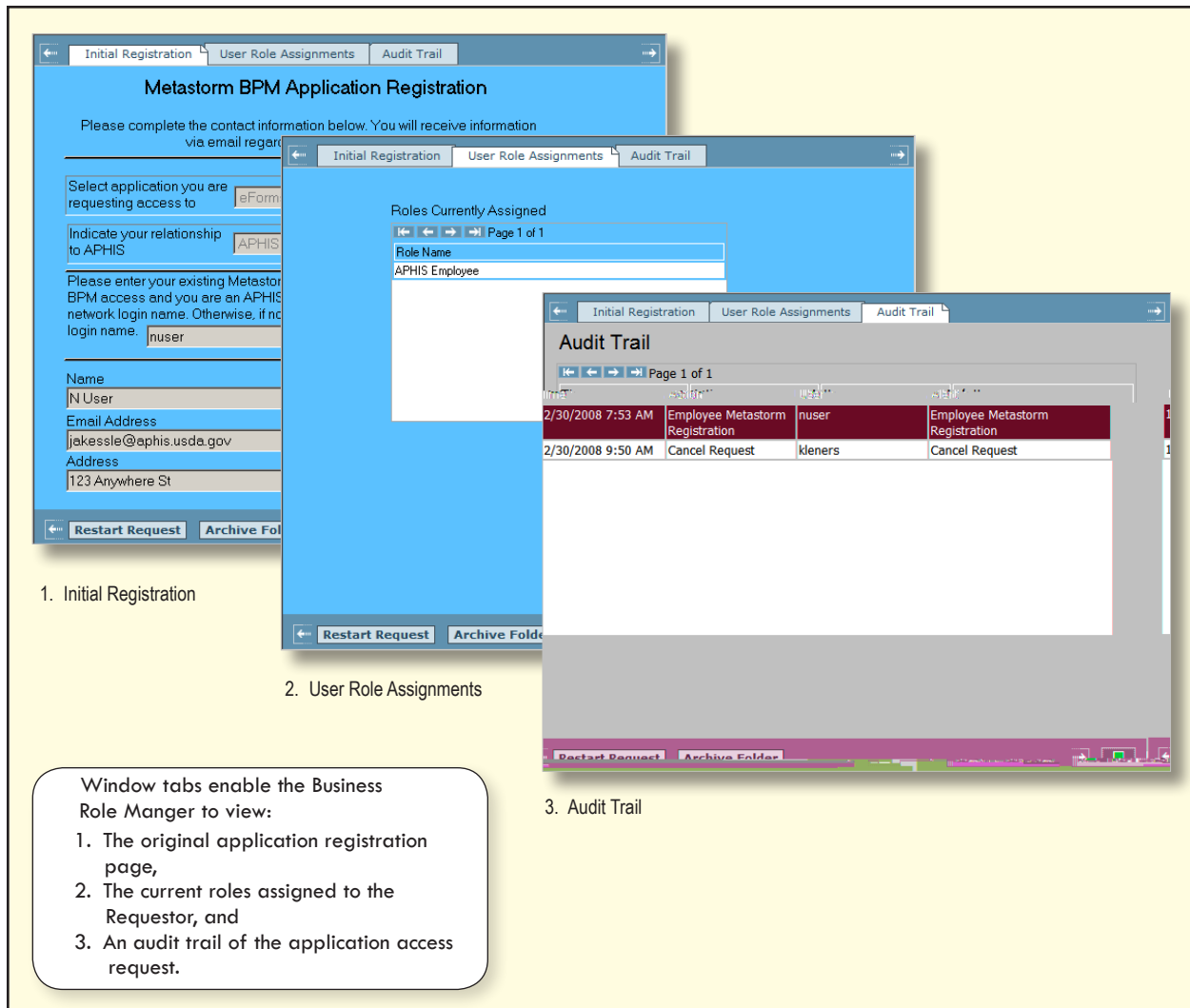
Figure 5-2: Window Tab Views on a Previously Processed Registration Request

🖉 *Tabs at the top of the window only allow you to view the individual pages; you must use the action tabs at the bottom of the window to process the request.*

3. Two action tabs are located at the bottom of the processing window (see Figure 5-3).
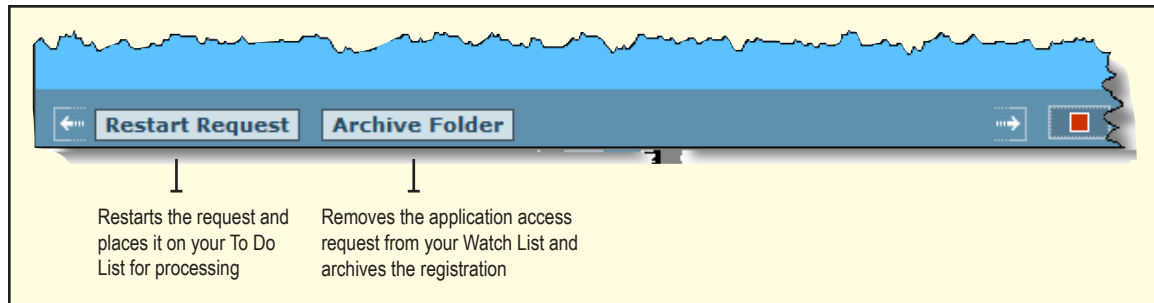
Figure 5-3: Action Tabs Available on a Previously Processed Registration Request

4. If you want to remove the application access request from your   and archive the registration, click Archive Folder. When the confirmation window opens, click the green submit arrow. The registration is archived.

5. To restart the application access request, click Restart Request. When the confirmation window opens, click the green submit arrow. The request is moved to your   .

5.1.2   Restarting Application Access Requests Using the Blank Forms List

1. Login to Metastorm BPM, select your   and click once on the Registrar BPM Registration action option (see Figure 5-4).
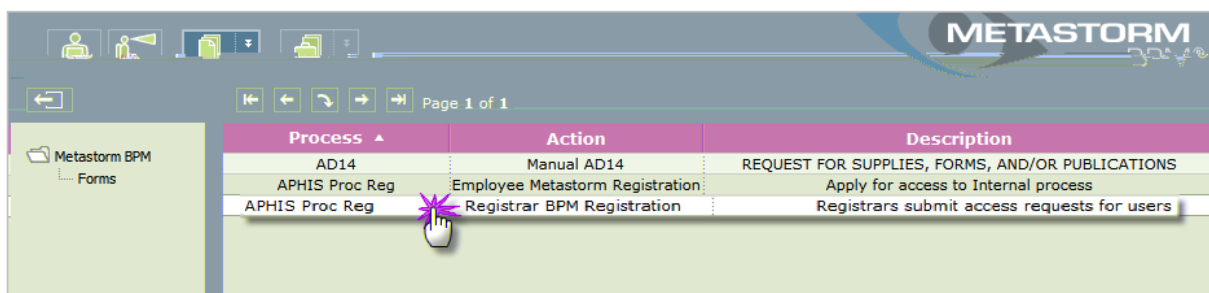
Figure 5-4: Registrar BPM Registration Action Option in Blank Forms List

2. When the
    window opens, enter information for the user whose registration request you are trying
    to restart. When you complete the application registration f elds, click the green submit
    arrow (see Figure 5-5). The request is moved to your To Do List.

Figure 5-5: Completed Application Registration for APHIS Employees by Process Registrar Window

5.2   Processing Restarted Application Access Requests

1. After you restart an application access request, choose your   and click once
    on the restarted request (see Figure 5-6).

Figure 5-6: Metastorm BPM To Do List Showing Restarted Request

2. The Metastorm BPM Application Registration processing window opens (see Figure 5-7).

Figure 5-7: Metastorm BPM Application Registration Processing Window

3. Refer to Section 4.2 for information about editing the request, assigning access, denying access, canceling the request or revoking access.

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Chapter 6
Verifying User Role Assignments

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T his chapter discusses the Query User Role Assignments feature that allows Business Role Managers to search user role assignments. Access to the Query User Role Assignments feature is automatically assigned to Business Role Managers who manage a Metastorm BPM business application.

6.1   Using the Query User Role Assignments Feature

1.   Login to Metastorm BPM and click Administration Forms to access the Query User Role Assignments option (see Figure 6-1).
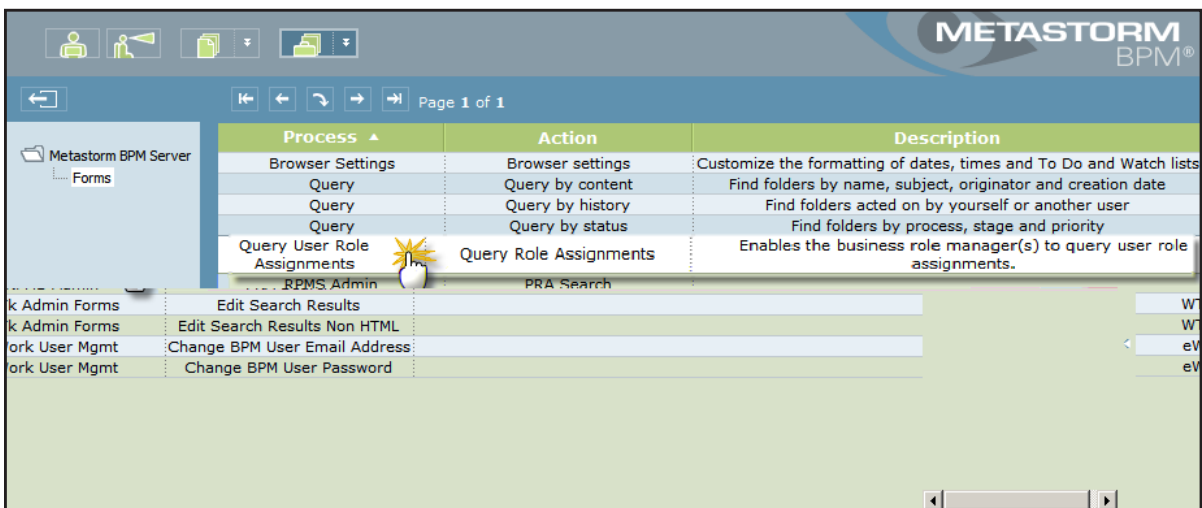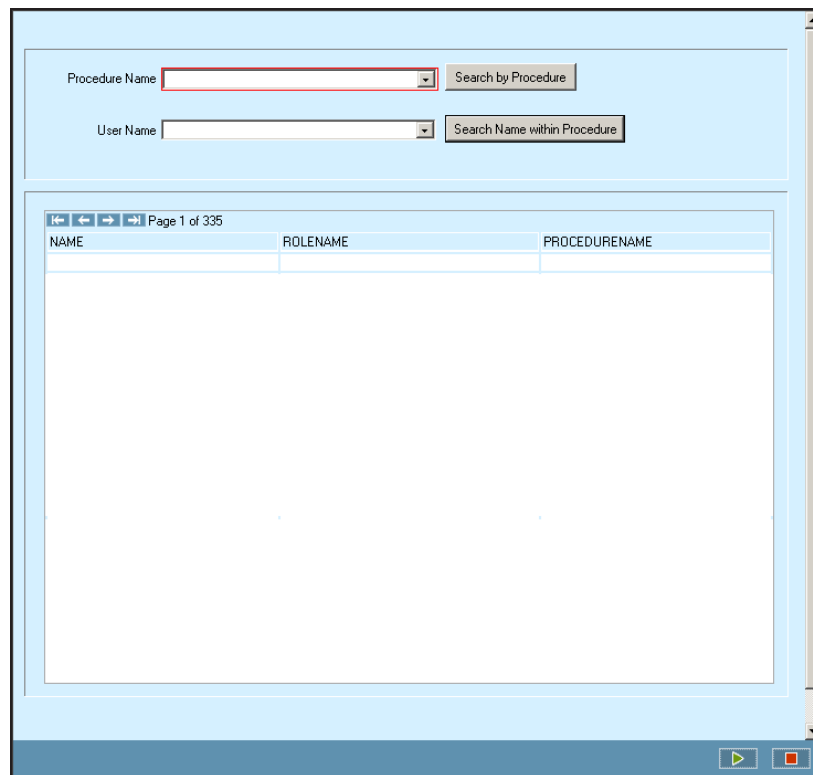
Figure 6-1: Query User Role Assignments Processing Option

2. Click once on Query User Role Assignments to open the query window (see Figure 6-2).
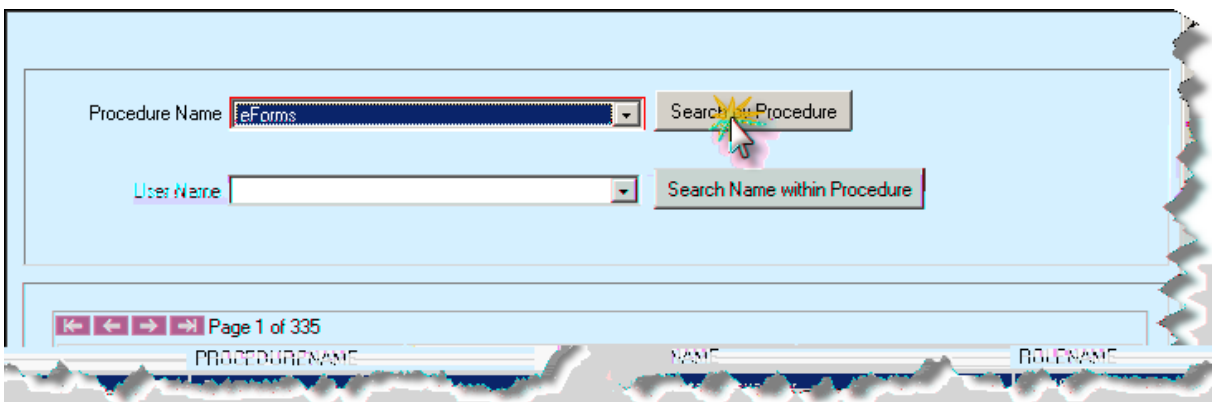
Figure 6-2: Query User Role Assignments Window

3. Choose the Procedure Name from the dropdown menu and click Search by Procedure (see Figure 6-3).
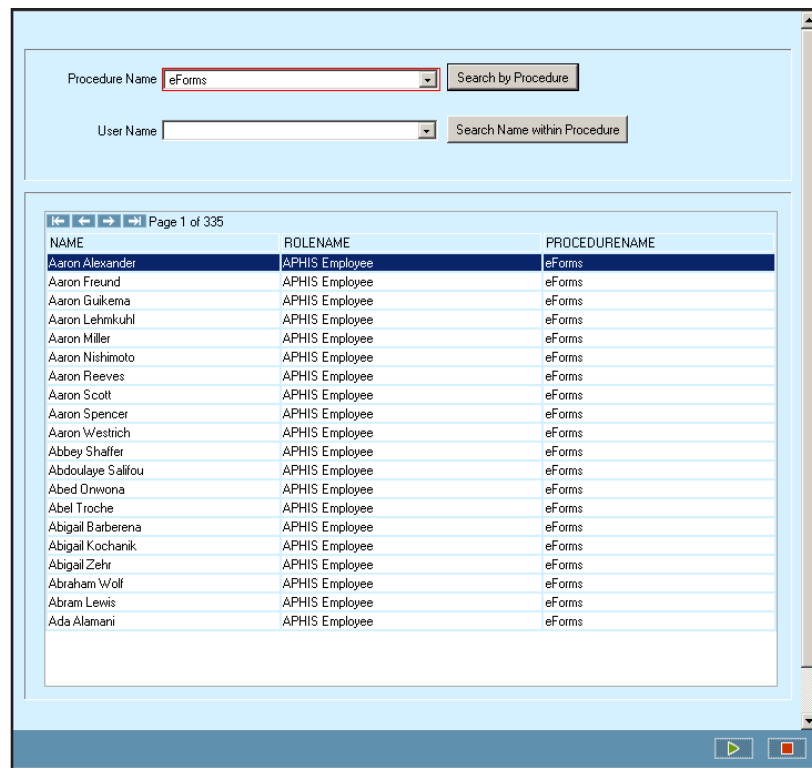
Figure 6-3: Search by Procedure Query Option

4. The query window displays the Name and Role Name of all users associated with the selected procedure (see Figure 6-4).

Figure 6-4: Query Window Displaying User Role Assignment Results

5. To further narrow your search, select the Procedure Name and User Name from the dropdown menus; click Search Name with Procedure (see Figure 6-5).
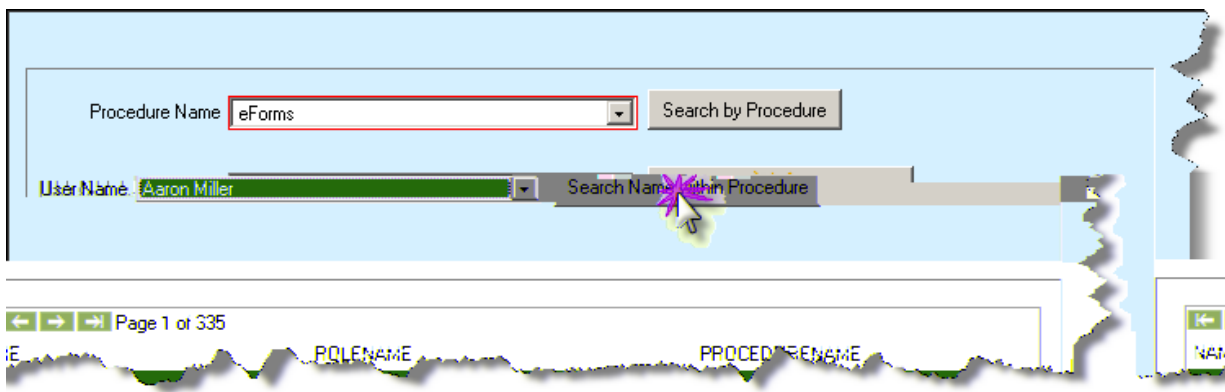

Figure 6-5: Search Name with Procedure Query Option

6.   The query window displays the specified name and procedure in the display grid (see Figure 6-6).

Figure 6-6: Query Window Displaying Specified User Role Assignment

7.   Once you have completed your query, click the red cancel arrow to close the window and return to the Metastorm BPM Administration Forms Window.